

DOCUMENT RESUME

ED 132 951

HE 008 535

AUTHOR Kurland, Norman D.
TITLE A National Strategy for Lifelong Learning. Remarks Prepared for the Dialogue on Lifelong Learning.
INSTITUTION George Washington Univ., Washington, D.C. Inst. for Educational Leadership.
PUB DATE 18 Oct 76
NOTE 16p.
AVAILABLE FROM Institute for Educational Leadership, The George Washington University, Suite 310, 1001 Connecticut Avenue, N.W., Washington, D.C. 20036

EDRS PRICE MF-\$0.83 HC-\$1.67 Plus Postage.
DESCRIPTORS *Adult Students; *Continuous Learning; Counseling Programs; Degrees (Titles); Educational Innovation; Educational Legislation; *Educational Objectives; Educational Supply; *Employment; Federal Legislation; Financial Support; Higher Education; *Learning Experience; *National Programs; Outreach Programs; Policy Formation; Post Secondary Education; Social Responsibility; Speeches; Student Motivation
IDENTIFIERS Higher Education Act Title I; *Lifelong Learning Amendment

ABSTRACT

In these remarks a strategy for lifelong learning is shown to be a strategy for achieving certain basic objectives in education. These include: (1) equality objective; (2) objectives in relation to education and work; (3) objectives related to the need for a common set of values; and (4) objectives related to the motivation of students. Several problem areas are identified in which changes must occur if lifelong learning is to be achieved. They deal with changes in secondary education, changes in postsecondary education and credentialing, the relationship between formal and informal education, changes in outreach and counseling, changes in the system of financing education, and changes in the relation of education and work. The current situation since the Lifelong Learning Amendment was added to Title I of the Higher Education Act is assessed. (LBH)

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**THE
GEORGE
WASHINGTON
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*Suite 310
1001 Connecticut Ave., N.W.
Washington, D.C. 20036*

*Samuel Halperin
Director
(202) 833-1737*

*Education Policy
Fellowship Program
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A NATIONAL STRATEGY FOR LIFELONG LEARNING

Remarks Prepared for the Dialogue on Lifelong Learning

October 18, 1976

By

**Norman D. Kurland
Director -- Study of Adult Education
New York State Education Department
Albany, New York 12234
(518)474-5972**

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One of the key events in the evolution of the concept of lifelong learning has been the inclusion of Part B of Title I of the Higher Education Act in the Education Amendments of 1976 -- the Lifelong Learning Amendment.

I thought that it might be appropriate, therefore, to organize my remarks around the former Title of Part B: "National Strategy for Lifelong Learning." Why a National Strategy at this time?

What I suggest is that we have reached a point in our history at which we have an opportunity to chart a course for the future, to direct, if you will, the flow of a number of educational streams so that they more readily can nourish the learning needs of the American people.

We now have a choice. We can let these streams flow on their separate ways, each pretty much serving the needs of the various groups that they have been serving. We can increase the flow in some, slow it down in others, and even start up new streams. Essentially, this is a strategy that would leave the relations among the streams unchanged and leave unchanged the present system of youth education.

The alternative is to adopt a strategy for bringing the various streams together into new relationships and in the process changing, not only what we do for adults, but also what we do for youth. The aim of such a strategy would be to give clearer direction to the flow of education throughout the lives of people, so as to mix work with education in new patterns that not only enrich both parts of our lives, but also make it economically feasible to extend opportunities for learning to more people for a larger share of the life span. Because

the emphasis is on the entire life span and on the initiatives of individuals in seeking education, I like the term "lifelong learning" and would like to see a strategy for making it a reality for all people. If others are happier with other rubrics -- adult education, nontraditional learning, recurrent education, let us not quarrel. Let us see, instead, if we can agree on the outlines of the strategy whatever it may be called.

In the discussion that follows, I am going to draw very liberally and, in places, literally on a 1974 paper by Jarl Bengtsson entitled, "The Swedish View of Recurrent Education." Bengtsson lays out a long-term strategy for restructuring the organization for study after the completion of compulsory schooling that is very suggestive for what we might devise as our "national strategy for lifelong learning."

In the following chart, freely adapted from Bengtsson, are presented several models for fitting education into the years of work and retirement.

In adapting Bengtsson's models for "recurrent education" to make them models of "lifelong learning" some significant changes had to be made which reveal the differences between the two concepts. The changes were the following:

1. "Work" had to be broadened to include whatever is one's primary life activity, not just "work in occupations."
2. In the recurrent education models, work and education were primarily seen as being carried on in separate "recurrent" period in life; in lifelong learning there would be much more part-time study and work and more attention to independent learning.
3. In the recurrent education models, all of the education was referred to as "refresher or upgrading." In lifelong learning these would be both work-related education and education that is not work-related, including personal development.
4. The recurrent education models did not include retirement which is a vital addition to the lifelong learning models.

While these models suggest structural changes in the placement of education throughout life, they do not, of course, indicate much about the nature of the educational changes that would have to occur. These will only emerge as the restructuring occurs, but the general outlines of the changes that are likely to occur under a lifelong learning strategy are becoming clear.

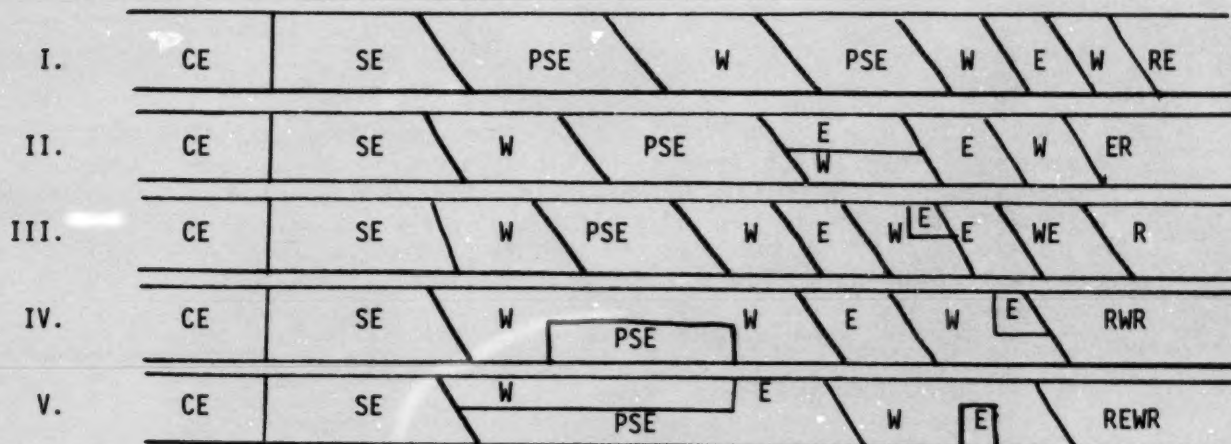
The basic change, of course, is that under such a strategy, education would not primarily be provided in an uninterrupted way from school entry at age five or six until school leaving after high school, college, or graduate school. While our system is already moving in this direction, formal acknowledgement, both in public policy and in the minds of people,

(Text continues on page 5)

Figure 1: Some Possible Models for Lifelong Learning

E = Education CE = Compulsory Education SE = Secondary Education PSE = Postsecondary Education

W = Work R = Retirement



- Model I:** Postsecondary education continues directly from secondary school. A first period of postsecondary education is followed by work, after which the postsecondary education is completed. After some working years, a brief educational period follows, consisting perhaps of a refresher or upgrading course with some specialization. Retirement is interspersed with education.
- Model II:** From secondary school direct to work, after a period in which postsecondary education is completed in one sequence. Further education is interspersed with work. A period of education precedes retirement.
- Model III:** Periods of work both after secondary school and between periods of postsecondary education. Further education is interspersed with work. Education during the final years of work prepares for retirement.
- Model IV:** Part-time postsecondary educational studies concurrent with work. These begin after a period of work following secondary school. Further education is interspersed with work. A period of retirement is interrupted by a return to work or part-time work is continued during retirement.
- Model V:** Part-time postsecondary education starts concurrently with work immediately after secondary school. Final period of postsecondary education is full-time. Further education is interspersed with work. Education and work continue to be intermingled during retirement.

Figure 1 Continued

All of the lines separating periods after compulsory schooling are slanted to emphasize that these transitions take place at different times in the lives of different individuals. The chart does not indicate changes in the secondary school, but it is clear that all would have an impact. Models II, III, and IV would require some vocational preparation for all students and, of course, the various patterns for relating postsecondary education and work could be extended back to the final secondary years. Thus, for example, some students might go to work immediately after compulsory schooling and finish their secondary education at a later time. "Work" includes home and family care.

The patterns of education and work during retirement can be interchanged among the models. There is no particular relation between the pattern during working years and the pattern in retirement.

Derived from Jarl Bengtsson
"The Swedish View of Recurrent Education"
Mimeo 1974

Norman D. Kurland
Study of Adult Education
New York State Education
Department
September 8, 1976

would have profound impact on the ways in which we seek to fulfill some of the basic objectives of education. What I want to try to show is that a strategy for lifelong learning can be a strategy for achieving certain basic objectives in education. I will then indicate some problem areas that must be dealt with in any comprehensive lifelong learning strategy.

1. Equality Objective

Equality has been a key issue and prime objective in education for at least a generation. When free public education did not produce equality, we raised the age of school leaving, adopted the comprehensive high school, introduced compensatory education, preschool programs, and busing for racial integration, got court orders, open admissions, basic opportunity grants, equal rights amendments, and quotas or targets.

And yet, even looking only at the exercise of opportunity, not at outcomes, data shows that the present system fails to meet the goal of equal educational opportunity. How much education of what kind individuals get is still too closely tied to family background and economic circumstances. Since so much effort has as yet failed to change the pattern, it is time to consider whether the present organization of education, with its focus on youth, may not itself be a real stumbling block in the way of reaching this goal.

Under a system of lifelong learning, success or failure in schooling would be less dramatic and decisive. Many young people for whom schooling has been unsatisfactory could get work experience before undertaking further education. Systems would be designed to encourage, stimulate, and facilitate movement from work to education and back to work. For example, Barry Stern has suggested that the amount of education a person gets is more a consequence of the kind of job he gets than the reverse. If this is now the case, more could be done to build into jobs the conditions that lead workers to seek and use more education. Such job redesign would be a counterpart to the educational redesign that has already begun in adapting the educational system to meet the needs of people with varying levels of previous education and amounts of work and life experience.

Such adjustments will not, of course, be made overnight. Lifelong learning is, therefore, a long-term strategy that builds upon the present short-term changes that are already underway. It is also only in the long-term and from the perspective of a generation that we can determine if the objective of equality has been achieved. The best case, in the shorter term, for shifting to a lifelong learning strategy is that it, at least, leaves open the doors of opportunity for much longer than does the present system. It acknowledges what we now know -- that all people develop and change throughout life. The dull teen-ager, with no interests and little aptitude for study, may catch fire as a young adult. It should be as easy at 25 for him to continue his education as it would have been at 15.

There is another way in which a lifelong learning strategy can help achieve the goals of equality. Lifelong learning means that learning begins with life itself. The first years of the child's life are learning years -- and, many would say, the most critical years. The family, supported by other agencies in the community, should provide a rich learning environment for the child. Today, many parents need help in learning how best to raise their children. A strong program of parent and family education should be a cornerstone of a strong lifelong learning strategy. If every child is given a good early start in life, if options for continued learning are kept open throughout life, then the probability that we will come closer to the goal of equality will be increased.

In short, the contribution of lifelong learning to equality is one of the strongest arguments for lifelong learning; and should be a key ingredient in the strategy for its achievement.

2. Objectives in relation to education and work

For a long time, it has been a desire to find ways to forecast manpower requirements and work out ways to match education and training to such forecasts. The forecasts, however, have generally failed because the speed of change and the needs of the labor market have been underestimated. Past response was to encourage youth to pursue as broad a curriculum as possible so as not to get locked into dead-end jobs. As long as there were plenty of jobs, this approach was reasonably satisfactory. To get any workers at all, employers were willing to provide the extra training needed to prepare individuals for their specific jobs. More recently, as the job market tightened, young people are being advised to prepare more narrowly for specific jobs. Even so, many are going to be disappointed and many areas are going to lack the trained manpower needed. The difficulties with manpower forecasting are not likely to diminish in the future because of rapid changes in industry, the knowledge explosion, and the shifting values of society. Moreover, fewer individuals may now be prepared to commit themselves to long periods of preparation for jobs that may not exist when they finish or that they may no longer want.

This suggests the need to restructure both jobs and education in order to shorten the period of preparation for most jobs, while increasing the opportunity to advance to higher levels of competency and responsibility through an intermixture of work and advanced levels of study. Such a change would ease the problem of matching education to the needs of the labor market, fit better the emerging career patterns of most people, and probably result in a better utilization of educational resources, since, with a shorter gap between the awareness of a job opportunity and the time it takes to prepare for it, there would be both less overproduction of trained persons and fewer jobs that went unfilled for long periods of time.

In short, not only would the goal of matching job requirements and work be better realized within a lifelong learning strategy, but also the savings in resources would help pay for the increased costs of the strategy.

3. Objectives related to the need for a common set of values.

One of the major thrusts behind career education has been the desire to reduce the gap between the values learned by youth in school and the values of the work place. Too, many young people had an inadequate understanding of the nature of work and the values represented by the world of work. There was concern that a serious generation gap had opened that could have had dangerous consequences. This was one of the concerns to which career education sought to respond.

A lifelong learning strategy would reinforce this response by increasing the occasions in which there would be a mix of generations along with a mix of education and work. With more adults as students and more young people as workers, the sharp divisions between the worlds of work and education should disappear.

4. Objectives related to the motivation of students.

The dropout problem, particularly in our city schools, remains severe. In New York City only about 50% of the ninth grade students graduate from high school. Much of this is because of the monotony and isolation of the school from the world that matters to young people. Yet these same young people can and do learn intensively when they discover a reason to learn -- usually in association with the need to get or keep a job.

A lifelong learning strategy would seek alternatives to school for those young people for whom education has no meaning and would ease the entry back to schooling when an individual found the need and desire for it.

A rather opposite concern is with the growing number of students who choose to continue in education because they know it is a "must" in modern society -- not because they have any real interest in study. In the present system, they feel they must take the opportunity for education or lose it forever. A lifelong learning strategy would encourage young people to interrupt their education for a period of work, public service, or travel. Such interruptions might improve career selection and impart a healthy motivation for continued study.

It is also well known by all educators of adults that most adult students are more highly motivated than youth and learn most subjects more quickly than youth. Youth studying in the same classes with adults are often spurred to higher levels of accomplishment than when studying only with peers. That is one gain from lifelong learning. But, the biggest gain may be in efficiency. Educational resources devoted to teaching motivated students do much more than when the students are not motivated.

As Cyril Houle has noted: "Almost any subject is studied with much more interest and intelligence by those who know something of its subject matter than by those who do not...Any specific kind of learning is most effectively undertaken when the time for it has come. The total pattern of a desirable education requires an understanding of the full span of human existence." Or, in other words, when the pattern of education develops in the context of lifelong learning, motivation to learn will be great and the efficiency of education enhanced.

Problems in the Implementation of a Lifelong Learning Strategy

Turning now from objectives to problems, I want to discuss several problem areas of education in which changes must occur if lifelong learning is to be achieved.

Changes in Secondary Education

At the present time secondary education has many features that are inconsistent with a lifelong learning approach:

Graduating from high school is considered "good", dropping out is "bad".

Those who are in the college preparatory program are often ill-equipped for employment immediately after high school; those who are in occupational programs usually have limited options for postsecondary study.

Much of the curriculum emphasis is on content and is heavily teacher dependent; little attention is given to development of independent learners, or to personality development and life coping skills.

As distinct from this, under a lifelong learning approach, students could move in and out of formal study without stigma. All students would be encouraged to prepare both for employment and further study. Education would encompass a broader range of activities, including work experience, community service, travel, creative work in the arts, and independent study. The developmental as well as intellectual needs of youth would be formally recognized as legitimate concerns.

To make such arrangements possible, not only must the school change, but adjustments will be required in the world of work in order to make real job experience available to youth. Willard Wirtz has addressed this problem in The Boundless Resource. Employment officers and postsecondary admission officials will have to treat equitably students who pursue a continuous program of study and those who follow other patterns.

Much of the movement in career education is in this direction as are various proposals being presented under the rubric of "youth policy." One of the greatest challenges to our society will be to regain for themselves and for society those youth who in recent years have dropped out of school and have had nowhere to go except to the streets, to drugs, and to crime. Equally important will be to put in place programs that give

those still in school valid options as they reach the point at which school no longer has an appeal.

Changes in Postsecondary Education and Credentialing

To make postsecondary education a part of a lifelong learning system will require changes paralleling those at the secondary level. The most important change would be to move away from the emphasis on terminal degrees and toward the concept that each stage of education should be, first, in itself valuable as a learning experience, second, useful as preparation for further study, and third, helpful in achieving one's career and personal goals. Options should be increased so that every individual can find a suitable pattern of education. The individual who wants to acquire specific skills or mastery of a specific body of knowledge would be accommodated in short courses, as well as the individual who wants to acquire mastery of a discipline through a structured sequence of courses.

Much in postsecondary education is moving in this direction and it may only be necessary to encourage movement already started. The biggest threat to this movement could come from credentialing and licensing authorities if they insist on recognizing only certain limited patterns as qualifications for the credential or license. Provision for the effective assessment of the learning acquired through work and life experience will be essential, as will the acceptance of the results of such assessment as a basis for admission to programs of study, to licensing examinations, and to jobs with specific educational qualifications.

The movement would be fostered if all professions were organized in stages that provided for periods of study, internship and practice to be alternated throughout one's entire career. In that way the high status professions would not be limited to those willing and able to commit themselves to long periods of preparation -- a gain for equality. Such an adjustment might also make the professions much more able to adjust more rapidly to changes in knowledge and in societal expectations.

The Relation Between Formal and Informal Education

Much of the learning activity of adults takes place outside the formal structure of education. Libraries, museums, community agencies of all kinds, the media, churches, and employers are all significant providers of learning opportunities. One of the great strengths of existing arrangements is the wide diversity of options that are available. Most of this diverse provision has grown up in response to the needs and demands of the public with little or no explicit governmental involvement.

A lifelong learning strategy must certainly build upon this existing

provision and foster its continued expansion. It would be a disaster of major proportions, if, in our desire to expand learning opportunities, steps were taken which had the effect of diminishing the role of the private, informal structures. There is no way that the diversity, responsiveness to changing needs, and vitality of this "system" could be replaced by a formal, largely public system.

A major objective of a lifelong learning strategy must certainly build upon this existing provision and foster its continued expansion. It would be a disaster of major proportions if, in our desire to expand learning opportunities, steps were taken which had the effect of diminishing the role of the private, informal structures. There is no way that the diversity, responsiveness to changing needs, and vitality of this "system" could be replaced by a formal, largely public system.

A major objective of a lifelong learning strategy should be, to use the phrase so aptly conceived by Sam Gould, "diversity by design." We need to balance the conditions that foster diversity and freedom of choice, with conditions that insure equality of access, quality of program, and attention to public needs. The strategy, as it evolves, should indicate appropriate roles for the Federal government, for state and local governments, and for each of the varied parts of the private sector. What should evolve, I would suggest, might best be thought of, not as a lifelong learning "system," but as a broad array of services in support of lifelong learning -- a subtle distinction, perhaps, but a distinction worthy of consideration.

Such developments as the Cooperative Assessment of Experimental Learning, the Regents External Degree, or the program to assess instruction provided by non-college organizations by ACE and the New York State Education Department, are all helping to build bridges between the formal and the informal structures.

Changes in Outreach and Counseling

In every survey of adult needs, adults indicate the need for more and better information and counseling service. Today counseling is largely available only to those already connected to a school or college. It has only been in the last few years that efforts have been made to reach out to help adults who have not yet made a commitment to further study and may not even be sure that that is what they want.

A key element in the lifelong learning strategy will be the provision of a broad range of counseling services in every community. Or -- to use the term and concept being popularized by Fran Macy -- "educational brokering" must become a universal component of the system. More than four out of five adults in a national survey cited the lack of vocational guidance as the number one problem with their education, but only 3% of

vocational education funds are now spent for guidance and counseling (Education USA, September 6, 1976, p.6). This need for counseling service has been recognized in the proposed Higher Education Amendments of 1976 which contain numerous provisions for counseling services, including an expanded system of "Information Centers." Developing qualified people to be counselors and making their services conveniently available to people will do as much as any other single step to make lifelong learning a reality.

One key to the use of counselors will be placing them in situations in which adults feel comfortable. There is not a single setting that will be right for all adults. Therefore, counseling is properly being developed, not only in schools and colleges, but in libraries, community agencies, labor unions, work places, churches -- wherever, in short, people with a need for help are willing to seek it.

Changes in the System of Financing Education

The system of financing of education is heavily youth oriented. As the American Council on Education's report on "Financing the Part-time Student" noted, there is a pervasive bias against the adult part-time student. Today for the most part an individual who wishes to receive public support for his post-compulsory education must be a full-time student with financial need. There has been some beginning departure from this pattern. The BEOGs are available to the half-time or more student and the G.I. Bill, of course, has always been a major supporter of the education of older adults. However, a full lifelong learning strategy calls for an "age-neutral" educational finance policy. For reasons that I have developed at greater length elsewhere, there is no good public policy reason any longer for concentrating support of cost-compulsory education on younger, full-time students. Moreover a system of financing education for adults should provide for the major decisions on how, when, and where funds may be used to be made by adults themselves. This suggests the movement away from primary reliance on institutional support to aid provided directly to the student -- a direction already taken strongly by the Congress and some states.

Just what the nature of the financing arrangements should be that would best support lifelong learning is a matter now under study. What should be the dimensions of public support of lifelong learning? How should it be distributed among various groups -- the undereducated, the economically disadvantaged, those in occupationally oriented study, minorities, women, the elderly? Should it be need-based and if so, how should the financial need of adults be calculated? (The latter question is the subject of a recent NIE RFP). What should be the mix of direct grants, loans, tax credits, and tax deferments? Should aid cover maintenance and other support costs or just direct educational expenses?

George Nolfi has recommended a limited voucher plan for adults in Massachusetts. A New Jersey Commission studying postsecondary education financing is apparently going to recommend some form of "free market" plan.

The Bureau of Social Science Research is studying a project in Portland, Oregon in which welfare clients are given vouchers to purchase occupational training.

NIE will soon be publishing a collection of papers on entitlements which I will be editing. We expect to follow this first set of papers by a number of further studies that will lay the foundation for a major national conference on entitlements in early 1978.

Barry Stern has called for a close study of all such explorations as well as for various other initiatives, such as raising the amount of income an independent student could earn to remain eligible for BEOG. The limitation of BEOG to five years of support should also be removed.

As important as the public subsidy of education in a lifelong learning system, is the support made available through private sources -- particularly by employers for their employees, either as a result of collective bargaining or company initiation. Another NIE supported study is about to examine aspects of this large area, and a study by Seymour Lusterman at the Conference Board is looking into the extent of educational provision by industry.

Changes in the Relation of Education and Work

Along with financial aid, a lifelong learning system will require new patterns for relating work and education. In Europe there have been significant early steps taken to provide for periods of paid educational leave, so that workers may undertake study without major sacrifice of income. How far should we move in this direction here? Should workers be entitled to a certain amount of educational leave, even without pay, without loss of employment rights? Can education be used as a counter-cyclical factor in the business cycle, providing an alternative to unemployment when the business cycle turns down? Can education serve to increase the numbers of persons who have jobs by providing that a significant portion of the work force at any time would be in educational activities? These are all questions that will be intensively examined as the nation seeks to evolve a lifelong learning strategy. They are the kinds of questions, along with many others, that will be able to be studied if Part B of HEA I is funded.

The Present Situation

This remark leads naturally to a consideration of where we are at the present moment now that Part B is law. A concerted effort will now be

required to get appropriations. It will also be important to monitor what HEW does to be sure that the regulations and administrative arrangements will facilitate the accomplishment of the objectives of the legislation.

It should be noted that, in addition to placing responsibility for lifelong learning in the Office of the Assistant Secretary, provision is made for calling upon the capabilities and resources of OE, NIE, FIPSE, NCES, the various National Advisory Councils and other agencies.

While it will be essential, in order to do the full task envisioned, that funds be provided, a number of key steps can and should be taken immediately:

1. Staff in the Assistant Secretary's Office should be assigned responsibility for implementation of the legislation.
2. A broadly based panel should be convened to advise on priorities among all the possibilities provided in the legislation and to suggest strategies for implementation.
3. The National Advisory Councils, the Coalition of Adult Education Organizations, and others should be asked for advice on priorities and strategies.
4. Current and proposed activities in OE, NIE, FIPSE, and NCES that relate directly to Part B should be identified and these offices asked for suggestions on how they can promote the objectives of Part B. When funds are available tasks that are within the capabilities of existing programs should be assigned to them with guidance as to what is expected. New administrative structures should be kept to a minimum.
5. The experience of past Federal programs and policy analysis should be assessed for what they reveal about the possibilities and limits of Federal action as guidance on how best to use Part B.
6. The plans that result from the above activities should form the basis for an appropriation request.

The funds will, of course, greatly facilitate the development of a lifelong learning strategy, but even if no new funds become available, movement will continue. The streams will all continue to flow. The Coalition of Adult Education Organizations is convening at Wingspread a meeting to consider the theme of "Lifelong Learning in the Public Interest" and develop a 1976 set of "imperatives for action." In November the Annual Conference of AEA-NAPSE will certainly hear much discussion of lifelong learning, and in January the Commissioner's conference on lifelong learning will focus national attention on this theme. Also, in coming months,

deliberations at OECD and UNESCO will be furthering international discussion of this same theme.

Apart from conference deliberations, studies, projects and action programs abound. A major portion of FIPSE grants are for projects that relate to lifelong learning. KIE is supporting a number of relevant studies and projects. Many states are expanding their services to adults and undertaking studies to determine the direction they should take. Most important -- adults themselves will continue to learn and institutions will seek to give ways to help.

But with all the signs of movement toward the evolution of a lifelong learning strategy, there is no occasion for complacency -- the separate streams may well remain separate; public interest in further education or its willingness to pay for it may wane. O'Keefe may be right that the years of rapid growth are past. Once education is seen no longer to be an assured path to higher earnings or better jobs, its bloom may fade -- or it may be seen as one of the sources from which people of all ages enrich their lives.

So there is much to give hope for the future; there is a lot of hard thought and work yet required, but there is a very reasonable prospect that America's third century will be the century of the learning society.